

Part 1 GENERAL SCOPE OF WORK	Public Relations/Advertising Services
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I. BACKGROUND

- A. The Citizens Clean Elections Commission's (Commission) duties and responsibilities are established in State law. Those responsibilities include the planning and administration of a voter education program. The Commission is seeking proposals from qualified public relations firms to provide a variety of Public Relations, Advertising and Creative Services. Public relations services being solicited include but are not limited to; Market Research and Evaluation; Advertising; Multi-Media production; editing, and duplication; Multiple Graphic Design Services; Audio and Video Production, Media Placement and Management; Procurement of Promotional items; Photography Services; and Full-Service Advertising Agency Services.
- B. The purpose of this contract is to develop an outreach and education program to promote awareness of the Citizens Clean Elections Act (Act). The Contract will consist of a media campaign, a program evaluation, and an array of community based programs implemented statewide. This campaign is envisioned as a long-term program that may be renewed year after year.
- C. The Act created a campaign financing system that provides full public funding to qualified candidates who agree to abide by the Act and Commission administrative rules. The Act was first implemented in the 2000 election.
- D. Legislative (State House of Representatives and State Senate) and statewide offices (governor, secretary of state, state treasurer, attorney general, superintendent of public instruction, corporation commissioner and mine inspector) are eligible to receive public funding from the Commission.
- E. Public funding is available only to "participating candidates" who choose to certify and qualify for such funding. The Act also significantly impacts "nonparticipating candidates," or those candidates who fund their campaign using private campaign contributions. The Act requires nonparticipating candidates to lower their campaign contributions limits by 20 percent and to adhere to additional reporting requirements.
- F. To qualify for funding, participating candidates must adhere to strict spending and contribution limits and gather a minimum number of \$5 qualifying contributions from registered voters who reside in their legislative district for legislative office candidates, or registered voters who reside anywhere in the State for statewide office candidates. Participating candidates also agree to attend required debates.

II. PROGRAM GOALS

- A. The goals of this outreach and education program are as follows:
 - 1. To increase and promote public awareness the Act and the Commission's responsibilities through a statewide public relations plan designed to provide a consistent message.
 - 2. To develop and implement programs specifically to inform and educate potential statewide and legislative office candidates that the Act is available to all qualified candidates and is easy to use.
 - 3. To develop and implement programs to improve communication and relationships with registered voters regarding the \$5 qualifying contributions and forms.
 - 4. To increase attendance and awareness of the Commission-sponsored debates.
 - 5. To involve the community and activist groups in the development and implementation of programs and activities, which promote and support involvement in the political process.
 - 6. To utilize effective outreach among Arizona voters, specifically within minority racial and language communities, and all other interested parties.

I. PURPOSE

The Contractor shall be capable of utilizing a variety of targeted media and public relations strategies to develop and implement statewide social marketing campaigns for public information, education and modification of attitudes, social norms and behavior. The Contractor shall be capable of devising innovative approaches that involve the media industry that promote synergy among targeted communities.

II. REQUIREMENTS**A. Account Management Services**

1. **Objective 1: Research/Strategic Planning** - The Contractor shall identify, gather and synthesize secondary research into a strategic advertising and public relations plan recommendation and develop research based “briefs”, media and public relations planning. The Contractor’s work in this specialized area may include, but is not necessarily limited to the following:
 - 1.1 Gather information and utilize research to develop an overall strategy for disseminating information about the \$5 qualifying contributions to specific target groups.
 - 1.2 Gather information and utilize research to make corrections in strategy.
 - 1.3 Utilize research to determine program effectiveness and gauge changes in target audience attitudes and perception and to improve advertising, marketing, public relations, and product development effectiveness.
 - 1.4 Evaluate public awareness and perception of the Act.
 - 1.5 Develop plan to educate potential statewide and legislative office candidates that the Act is available to all qualified candidates and is easy to use.
 - 1.6 Use market research plan to inform the overall statewide advertising campaign, market segmentation and message relevancy among specific target audiences.
 - 1.7 A final report summarizing the outcome and application of each research project must be approved by Commission prior to implementing.
2. **Objective 2: Multi-Media Planning and Evaluation** - The Contractor shall recommend, design, implement and analyze evaluative research (both qualitative and quantitative), for the purpose of refining strategies, evaluating concepts and measuring results including work from research briefs to develop a media recommendation which includes, but not be limited to the following:
 - 2.1 Geographic target recommendations;
 - 2.2 Demographic, ethnic and language target recommendations;
 - 2.3 Media vehicle recommendations to reach these targets that are cost efficient relative to budget; and
 - 2.4 Other annual media plan elements as appropriate.
3. **Objective 3: Budget Development**
 - 3.1 The Contractor shall:

- 3.1.1 Work from research brief to prepare an annual budget plan that supports the approved public relations and advertising plan.
- 3.1.2 Develop a comprehensive annual public relations and marketing plan incorporating the strategies, approaches, and budget to support all Commission products.
- 4. Objective 4: Plan Implementation and Management - The Contractor shall proactively implement and manage all aspects of the Commission's approved public relations plan for the purpose of maximizing resources, cost savings and results to include at a minimum:
 - 4.1 Develop and manage time lines for all key projects;
 - 4.2 Monitor and document approved public relations activities, verify and assess value realized and report results to Commission.
 - 4.3 Obtain samples of promotional and earned media coverage of press conferences, media events, press releases, report releases, community events, publicity events or other public relations activities approved by Commission and recap exposure and value to Commission and appropriate contractors.
 - 4.4 Manage and monitor plan to keep Commission apprized of all public relations activities, personnel/subcontractors responsible for activities, and assess the effectiveness of these services. At a minimum, event recaps, semimonthly written activity reports and monthly budget summaries will be provided by the Contractor to Commission, with additional reporting required at the discretion of Commission. Update staffing flowcharts.
 - 4.5 Transport, place, staff, maintain and store Commission public relations exhibits.
 - 4.6 Develop estimates for approval prior to any expenditures. Estimates must project all staff hours against fulfillment of service package.
 - 4.7 Solicit at least three competitive bids for external expenditures under \$35,000 compliant with Minority Business Enterprise Language in Special Terms and Conditions and three competitive written bids for external expenditures over \$35,000.
 - 4.8 Commission shall approve all account services performed. This includes, but is not necessarily limited to the following:
 - 4.8.1 Sufficient staffing to handle the Commission account in an efficient manner. Contractor must designate an individual with at least five years public relations experience to be the lead contact person on the contract. This person must be available to work with the Commission as often as on a daily basis. Contractor must also establish a second "point" person on the contract, if the lead person is unavailable.
 - 4.8.2 Enthusiasm and interest throughout the life of the contract with creative, promotion, public relations and account services.

- 4.8.3 Responsiveness - reasonable turn-around times without jeopardizing the quality of the work. Working closely with voter education manager, which includes traveling to speaking engagements throughout the state and anything else related to the public relations plan.
- 4.8.4 Ability to consistently meet reasonable due dates on projects and flexibility to make changes within the plan, if necessary, based on the current needs of the Commission.
- 4.8.5 Acceptable billing and payment practices consistent with the Commission's billing and payment practices.
- 4.8.6 Flexibility to meet the complexities of the Commission's operations.
- 4.8.7 Objective, independent and strategic thinking
- 4.8.8 Disciplined and strategic approach to addressing marketing and creative problems.
- 4.8.9 Weekly status meetings followed up with a conference report.
- 4.8.10 Ability to initiate plans and proposals independently from those requested by Commission.
- 4.8.11 Assistance with the Commission's annual public relations, marketing and strategic plan.
- 4.8.12 Annual year advertising plan recommendation demonstrating effective statewide advertising support in achieving Commission stated program goals and objectives for voter education and public awareness.
- 4.9 The public relations plan will include such elements as maintaining a regular schedule of meetings with the Voter Education Manager, developing procedures to implement awareness campaigns, identifying when and what type of media press releases would be written, and analyzing and identifying target demographic groups, through market research. A schedule for meeting with public or media contacts, a method of providing information on candidate debates and candidate statement pamphlets will also be provided by the Contractor.
 - 4.9.1 In order to reach a wide audience, including the Native American and Hispanic markets, the Contractor shall include minority communities in Arizona as part of the strategic decisions and creative development. The Contractor shall provide all materials in English and Spanish, and media will be planned and placed with affiliates who broadcast or print advertisements in English and Spanish.
 - 4.9.2 The Commission shall have complete authority over the plan and shall have the express rights to modify, change or delete any part of the plan at any point during the contract.
 - 4.9.3 The Contractor shall arrange meetings or interviews with media representatives. The Contractor will speak to media representatives, on behalf of the Commission, if deemed appropriate by the Commission.

- 4.9.4 The Contractor shall be responsible for writing and distributing Commission approved news releases.
 - 4.9.6 The Contractor shall secure statewide public service announcements. The Contractor shall develop informational materials (print and Broadcast) that shall be provided to media outlets as public announcements at no charge to the Commission. The Contractor shall develop a plan to achieve media acceptance of these materials, shall propose low-cost production of these materials, and shall provide the Commission with a periodic report on the usage of such materials as reported by participating media.
 - 4.9.7 The Contractor shall be responsible for ensuring proper performance of all public service announcements or paid media contracts.
 - 4.9.8 The Contractor shall develop an in-depth knowledge of the Act and the Commission to actively participate in communication with the general public and the media. The Contractor will travel to all speaking engagements and will speak about the Act, on behalf of the Commission, if deemed appropriate by the Commission.
5. Objective 5: Budget and Billing Management - The Contractor shall execute the budget plan within the approved budget and **Bill Invoices Monthly**. The Contractor shall also maximize cost saving opportunities and comply with state guidelines including but not limited to:
- 5.1 Bill media and services no sooner than the end of the month in which they are consumed;
 - 5.2 Production activities may be billed 50% at start of project and 50% upon satisfactory completion of project; exceptions for pre-payment must be approved by the Commission on a case by case basis.
 - 5.3 Provide monthly billing reports in agreed upon format along with invoices. The monthly billing reports must track, monitor and report staff hours against service package.
 - 5.4 Provide payment to external vendors within 30 days of receipt of payment from the Commission exceptions must be approved by Commission.
 - 5.5 Keep an audit copy of monthly invoices with attached copies of all relevant external vendor net invoices paid.
 - 5.6 Keep original external vendor invoices reflecting net costs paid on file for audit reviews.
 - 5.7 The Contractor, its staff and any subcontractor per diem travel costs must comply with state travel guidelines. Overages will be assumed by the Contractor unless prior written approval is obtained through Commission according to Commission policy.
 - 5.8 Update annual budget reports monthly and finalize at contract year end. Annual budget plan shall be actualized and delivered to Commission on a quarterly basis.

B. Creative Services

1. Objective 6: Multi-Media Concept Development - The Contractor shall work from research briefs to concept and present advertising and public relations message recommendations for, but not limited to, the following media vehicles: outdoor, newsprint, magazine, television, radio, Internet, direct mail, print collateral, promotional venues, premium items, audio tapes, videos, compact discs, digital video devices and emerging technologies.
 - 1.1 Developing consistently effective and creative advertising programs meeting the highest standards within the marketplace and the advertising industry, always featuring a strong selling proposition, which is memorable and effectively communicates the Commission's Voter Education and Outreach Program.
 - 1.2 Developing effective creative strategies that define target audiences by demographic, psychographic and geographic profiles within budget.
 - 1.3 When authorized by the Commission, develop a specific creative program, which maximizes awareness of the Act and the Commission within the budget. The Contractor shall recommend budget savings where appropriate.
 - 1.4 The Contractor will work closely with subcontracted or internal graphic design and creative firms, when called for in specific projects (see section F, page 12 for requirements regarding subcontractors).
2. Objective 7: Multi-Media Production – For all approved activities, the Contractor shall provide technical expertise and oversight of production process through to a final, professional, approved and delivered original product to include;
 - 2.1 Management of outside vendors used to facilitate production;
 - 2.2 Develop estimates for approval prior to any expenditure. The Contractor shall itemize specific charges for all services provided by in-house personnel including subcontractor personnel; No cost over and above approved estimate will be reimbursed.
 - 2.2.1 Develop budget plans for media, production and merchandising by product; for media and production of corporate image advertising if so directed and for marketing and advertising research.
 - 2.2.2 Provide timely and accurate billing for all projects and maintain appropriate accounting records consistent with State accounting procedures.
 - 2.3 Obtain the most cost-effective talent and usage agreements as appropriate. Recommend extended talent cycles and buyouts in cases when additional uses of advertisements and their components are anticipated (e.g. educational videos, training videos, curriculum materials, local project tagging, posters, promotional merchandise, etc.) as approved in advance by the Commission.
 - 2.4 Establish a subcontract with a media placement firm, approved by the Commission. The media placement firm shall secure media placement in outdoor advertising, newspaper & magazine advertisements, radio and other sources deemed appropriate for the campaign; advise the

Contractor and the Commission regarding types of media placement and the efficiency of each method; and offer creative ways to reach the largest possible audience.

2.4.1 Add Value/Bonus Commercials: The Contractor & media placement firm shall attempt to negotiate added value promotions and free bonus spots from all radio and TV stations included in a Commission media buy. Any added value promotions or bonus spots provided by participating stations shall be identified in the summary of media buys, and the value of the bonus spots shall be calculated and provided to the Commission, to demonstrate and quantify the savings.

2.4.2 Cooperative Advertising: The Contractor and media placement firm shall develop program proposals for Commission approval that will provide for cooperative advertising with retailers, media partners, or other products or services (i.e. co-promotion with soft drink company), including individual retailers and groups of retailers.

2.5 Solicitation of at least three competitive bids for external expenditures compliant with Minority Business Enterprise Language in Special Terms and Conditions for the following:

2.5.1 Creating and producing of all advertising materials for television, computer network, radio, print, outdoor, direct mail and transit advertising.

2.5.2 Producing collateral and advertising specialties, including but not limited to brochures, flyers, posters, bumper stickers, buttons, direct mail, and exhibits, and evaluating promotional programs, services and materials.

2.5.3 Creating and producing all advertising materials for print, broadcast and other media.

2.5.5 Printing, television, and radio production, research and promotional materials.

2.6 Verification of publication according to contracts and placement instructions.

2.7 Responsible for copyrighting on behalf of the Commission, advertising materials created under this contract. The Commission shall be the sole owner of all copyrighted material. All work products resulting from work performed under the contract shall be the property of the State of Arizona. Contractor shall ensure the property and materials are delivered to the Commission as follows:

2.7.1 Identification of appropriate master format per project.

2.7.2 Saved on a computer disk, in a changeable or compatible format, accessible by the Commission and furnished to the Commission at the end of each quarter, unless otherwise requested by the Commission.

2.7.3 The following list includes the work product documents to be furnished to the Commission: All plans, documents and recommendations; Lists

including, but not limited to: social service organizations, civic clubs, school, and tax preparers; Releases for talent involved in the media campaign; press releases, media advisories and letters to the editor; All photography, film, video, audio, music, and other media required to complete approved assignments including non-published material; It is understood that leased material may not become the property of the State of Arizona.

C. Advertising Services

1. Objective 8: Advertising Placement - The Contractor shall subcontract to a media placement firm or place approved buys themselves, with media vendors and ensure written confirmation is received to include:
 - 1.1.1 Traffic final advertising materials to media in a timely manner;
 - 1.1.2 Receive notarized confirmation or tear sheet as proof of performance along with invoice after execution of media; and
 - 1.1.3 Ensure accuracy of media invoices against approved plan, noting make goods or other adjustments to the client.
 - 1.1.4 Archive masters of all produced advertising. Make masters available to turn over to Commission at the end of every quarter. Deliver advertising or created materials in the approved format requested by Commission.
 - 1.1.5 As requested or approved by Commission, provide documentation in the manner and format requested for use in preparing reports or presentations on the advertising campaigns development implementation outcomes.
2. Objective 9: Media Management - The Contractor shall utilize available industry methods to confirm delivery of media value, negotiate and recommend changes for media plans including, but not limited to the following:
 - 2.1 Directing advertisement planning and placement toward specified target audiences by demographically, geographically, and psychographically targeting audiences to produce measurable results.
 - 2.2 Planning, negotiating, purchasing, and trafficking advertising according to a well conceived plan and preconceived criteria designed to produce maximum effectiveness for each dollar expended. Evaluating media use and placement using state of the art techniques to insure maximum effectiveness and that pre-set goals are met.
 - 2.3 Negotiate with the media to ensure costs are equitable with Commission spending levels. Identifying bonus spots, cooperative advertising and promotional opportunities.
 - 2.4 Developing a specific advertising plan that maximizes impact within the budget and recommending budget savings where appropriate.
 - 2.5 Negotiation, purchase and instruction for placement of all time, space or other media.
 - 2.6 Provide to the media outlets all materials necessary to fulfill advertising contracts.

D. Public Relations Services

1. Objective 10: Public Relations Service - The Contractor shall provide any or all of the following, but not necessarily limited to:
 - 1.1 Develop a public relations plan/public awareness campaign for two years, organized by month.
 - 1.2 Develop a management and monitoring plan including weekly written activity reports, monthly budget summaries and updated staffing flowcharts;
 - 1.3 Evaluate public relations activities/opportunities and their value to the Commission;
 - 1.4 Assist the Commission with press releases or other appropriate public relations activities;
 - 1.5 Plan, place and maintain the Commission exhibits, promotions and media support at fairs, exhibitions, sporting events, special events, etc.
 - 1.6 Generate statewide publicity coverage with the Commission's Voter Education Manager such as: Plan speaking engagements to as many civic clubs, social service organizations, and schools as possible.
 - 1.7 Plan and execute publicity efforts in support of the Commission's image development with prior input from Commission Voter Education Manager.
 - 1.8 Create positive working relationships with other public and private sector organizations.

E. Collateral Material and Advertising Specialties

1. Objective 11: Collateral Material and Advertising Specialties - The Contractor shall produce, manage and/or distribute collateral and promotional materials, including but not limited to brochures, flyers, posters, bumper stickers, buttons, t-shirts, hats, key chains, etc. and the following:
 - 1.1 Include promotional items in public relations plan, if necessary. Creating and producing materials such as displays, direct mail, pamphlets, brochures, posters, television commercials, and slide presentations.

F. SubcontractorsObjective 12: Contractors management of subcontractors -

1. Personnel: All subcontractors must be approved by the Commission prior to work being performed on any Commission-related project(s).
2. Billing: The subcontractors shall present the Contractor with a cost assessment for approval by the Commission before incurring any expenses on any project or work, which is billable under this contract.
 - 2.1 Billing related to the subcontractors' work or projects must go

directly to the Contractor who will then submit invoices to the Commission for reimbursement. All expenses incurred by the subcontractors will be reimbursed by the Contractor.

- 2.2 If the Commission feels that the subcontractors cost assessments, or any part of the cost assessments, may be unreasonable, the Commission has the right to have the Contractor acquire quotes on the project, in whole or in part, and allow the Contractor to utilize the most reasonable quote acquired. The Commission shall have final approval in deciding which scenario will result in a project most advantageous to the State.
3. The subcontractor shall maintain a full-time office in the Phoenix Metro area. The subcontractor shall ensure e-mail access to and from the Commission at no charge to the Commission.
 4. The subcontractor shall have direct contact with the Commission's Voter Education Manager and shall attend all meetings deemed to be pertinent by the Voter Education Manager. The subcontractor shall travel to and from the Commission at no charge to the Commission.
 5. All work generated by the subcontractor under the contract shall be the property of the State of Arizona.
 6. The subcontractors shall have the ability to consistently meet reasonable due dates on projects and provide reasonable turn around time on projects without jeopardizing the quality of work.
 7. All contractual qualifications and requirements that apply to the Contractor shall also apply to all subcontractors.

III. MINIMUM QUALIFICATIONS:

- A. The Contractor should have a minimum of 10 years development, implementation, support, and user based experience in advertising/public relations.
- B. Degrees in advertising, public relations and Accreditation in Public Relations (A.P.R.) accreditation are preferred.

IV. OTHER REQUIREMENTS

- A. Commission shall have copyright to all materials with license to all products produced by the Contractor.
- B. All creative material created by firm shall not be released to the public without approval from the Commission Voter Education Manager.
- C. During the term of the contract the Contractor shall inform the Commission's Voter Education Manager verbally, with follow-up in writing, any problems that arise during the term of this contract. The Contractor shall maintain a full-time office in the Phoenix Metro area so that staff is available as often as a daily basis. The Contractor shall ensure e-mail access to and from the Commission at no charge to the Commission.
- D. Prior to distribution of any material, the Contractor shall seek approval

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from the Commission Voter Education Manager.

- E. The Contractor shall prepare and deliver to the Commission on the tenth (10th) of each month an accounting of the expenditures for the prior month and a cumulative total for the campaign.
In addition, the Contractor shall submit a written report describing all work in progress with estimated completion dates and an itemized list of anticipated expenditures and costs for such work.
- F. The Commission shall be notified of any staff changes within 2 weeks of the change that occur during the course of the contract the Commission shall then approve or not approve the staff changes. If staff changes are unacceptable to the Commission, then the Commission has the right to cancel the contract.
- G. Compliance with the Commission Standards of Conduct.

V. SPECIFIC EXPENSES

- A. The Contractor shall pay all postage and telephone charges incidental to routine conduct of business or travel expenses, including time, incurred for normal travel to and from the Commission in Phoenix. Commission shall reimburse the following expenditures:
 - 1. All postage required for direct mail brochures, letters, etc., to the general public or a specialized market group if such correspondence is mailed in the name of or over the signatures of the Commission as part of the approved public awareness campaign or with the prior approval of Commission
 - 2. All telephone, facsimile and telegram charges necessary for the rendering of special or unusual services, such as, special phone surveys, extensive cancellation of space required by Commission.
 - 3. Reasonable travel expenses in accordance with the State of Arizona Travel Policy. Travel shall not be undertaken except by specific request and prior approval by Commission.

The Contractor shall not be paid for travel expenses incurred for normal travel to and from the Commission's office in Phoenix, Arizona and normal travel related to fulfilling the terms of this contract, if within 35 miles of the Contractor's office location. This includes public speaking engagements scheduled by either the Voter Education Manager or the Contractor.
 - 4. In accordance with the firm, fixed hourly rate, as stated on the Price Schedule, for each personnel classification necessary for the completion of special related tasks for which this contract does not otherwise specifically define. The Contractor shall have the Commission's prior written approval to undertake any special assignments.
 - 5. The Contractor shall present the Commission with an annual budget for the agreed upon public relations plan. After approval of the plan and annual budget, the contractor shall provide a detailed

cost assessment for approval on any media or broadcast purchase, marketing or research project or any other work before incurring any expenses. If the Contractor does not receive approval from the Commission, prior to incurring actual expenses, reimbursement for the Contractor's expenses cannot be guaranteed.

6. After the receiving approval for expenses, the Contractor will submit to the Commission any invoices for paid media advertising or campaigns in a timely manner.

VI. COMMISSION RESPONSIBILITIES

- A. The Commission shall advise the Contractor of any deficiency and require satisfactory corrective action from the Contractor.
- B. Reimburse Contractor in accordance with term of the contract.
- C. Voter Education Manager will be the point of contact for activities associated with the Scope of Work.